



Applicant: Hornick et al. Serial No: 09/771,358 Atty. Dkt. No: 17243-00035  
Title: METHODS AND SYSTEMS FOR IDENTIFYING PROSPECTIVE CUSTOMERS  
AND MANAGING DEALS  
John S. Beulick; Armstrong Teasdale LLP  
One Metropolitan Square, Suite 2600, St. Louis, MO 63102 (314) 621-5070

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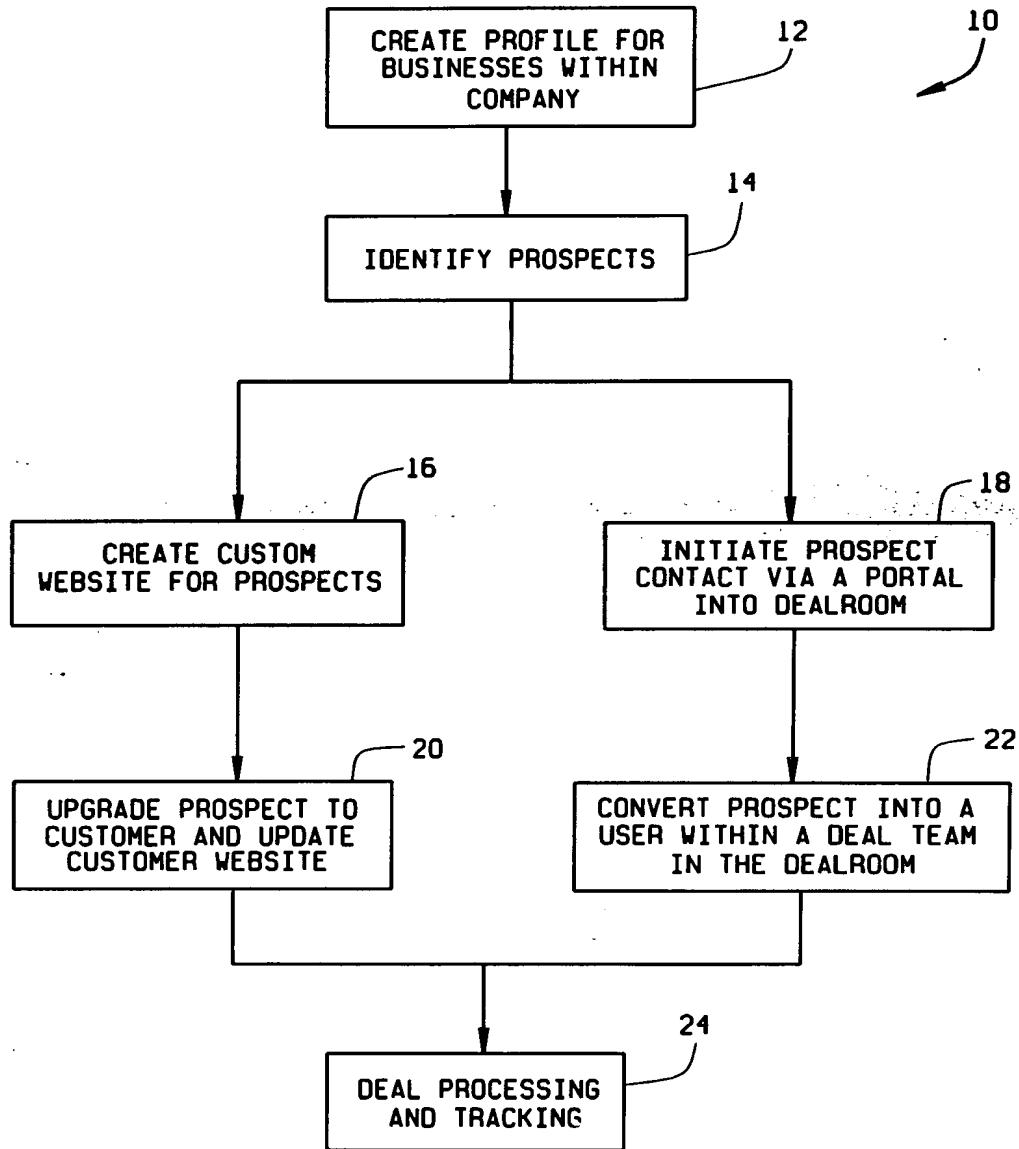
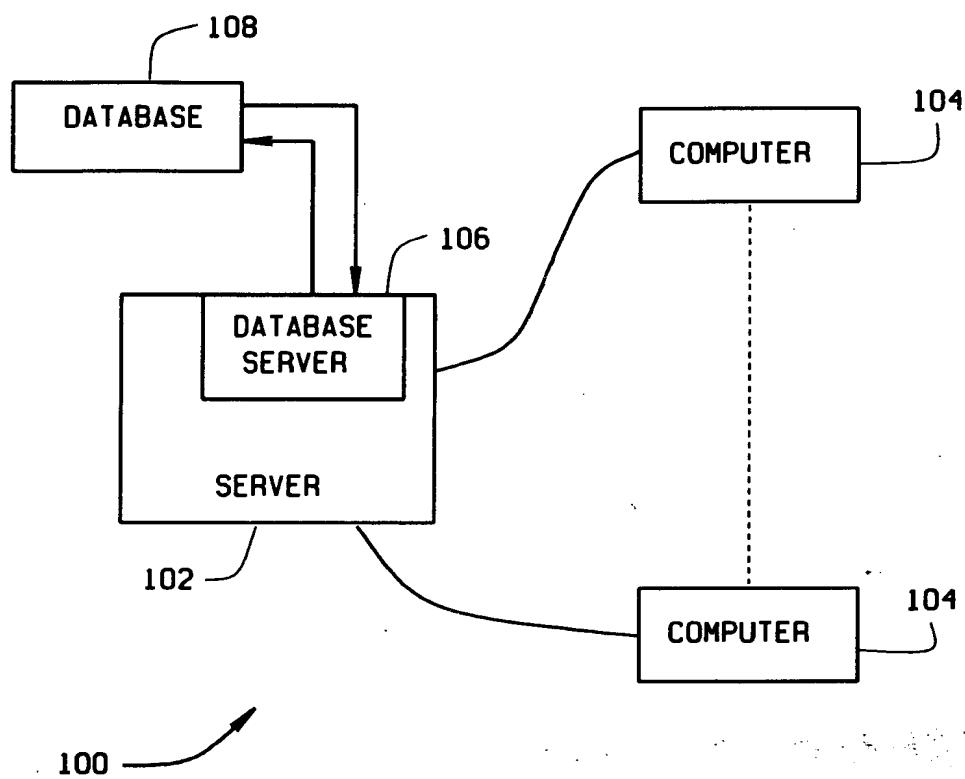
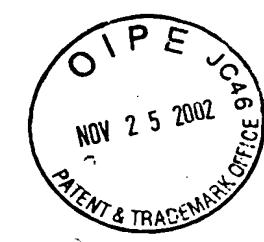


FIG. 1



F I G . 2



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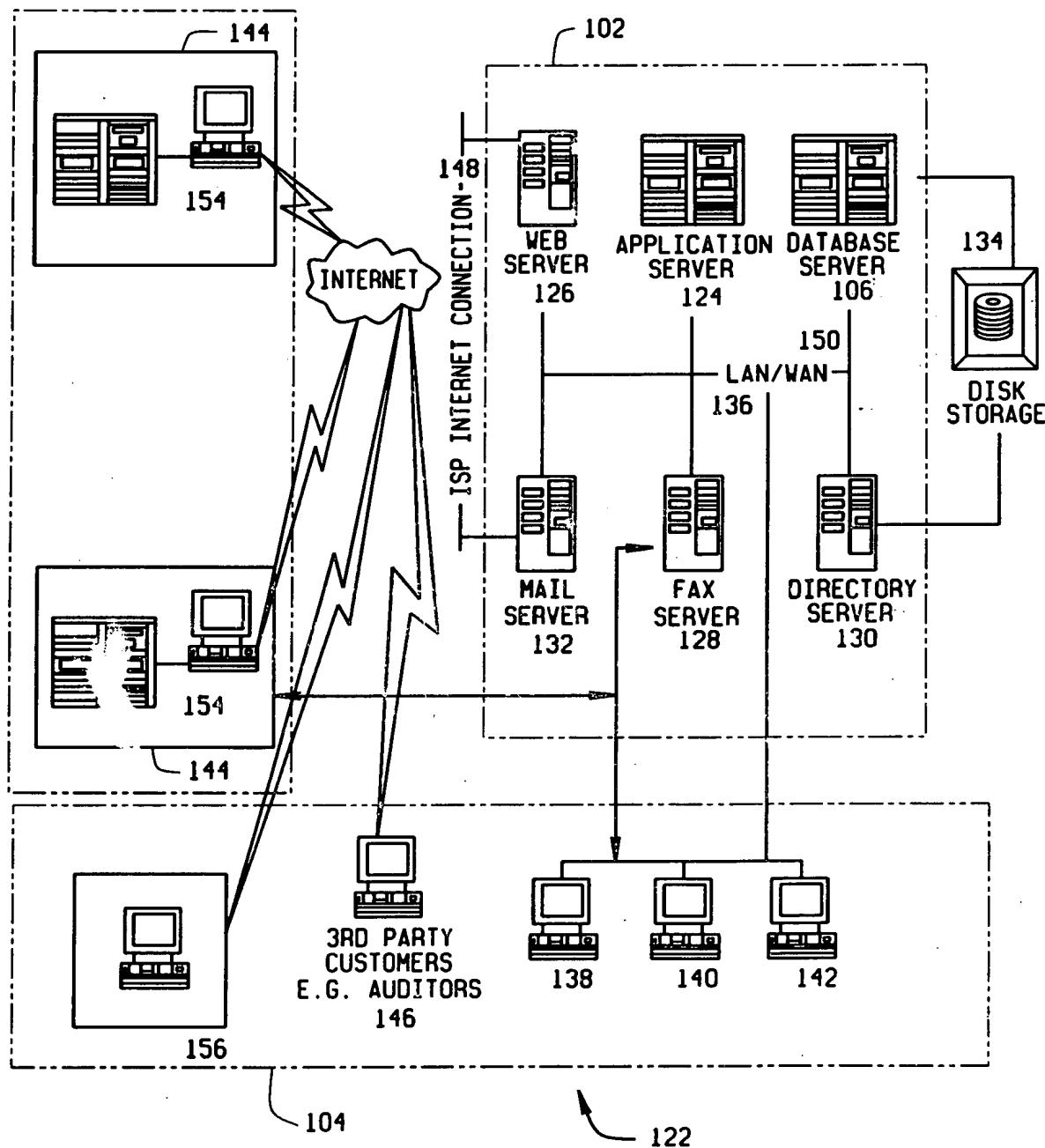


FIG. 3



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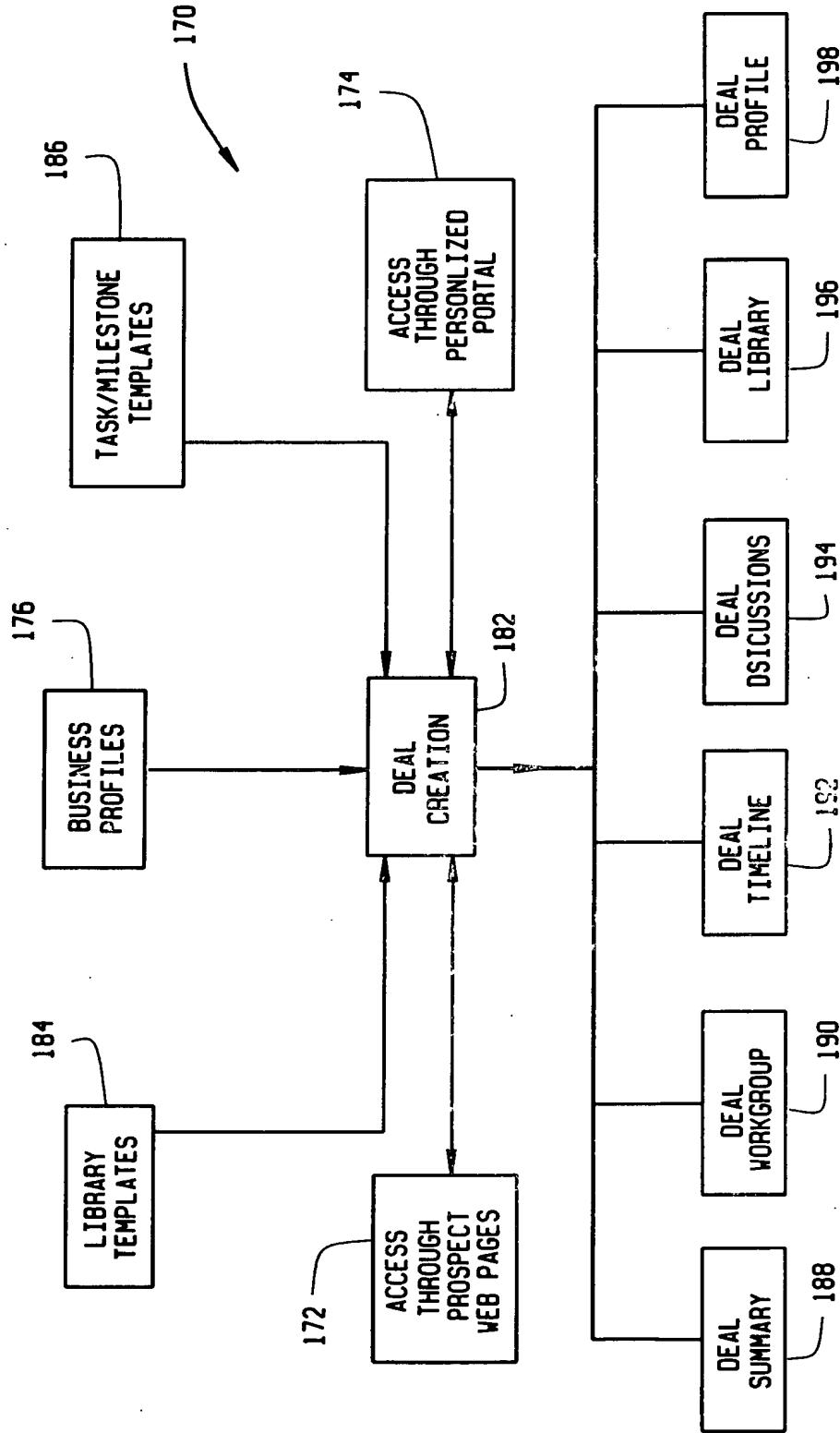


FIG. 4



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BUSINESS PROFILE							
BUSINESS NAME:	SFG	GO TO MARKET NAME:	SFG	HEADER GRAPHIC:	SFG-GIF	<input type="button" value="BROWSE"/>	
SELECT FUNCTIONALITY:		<input type="checkbox"/> USER ALERTS	<input type="checkbox"/> DOCUMENT SEARCH	<input type="checkbox"/> DEAL GROUPS	<input type="checkbox"/> DEAL SEARCH	<input type="checkbox"/> INVITE PROSPECT	
INFORMATION VISIBILITY: VIEW ACROSS BUSINESS DIVISION ACROSS DIVISION							
DEAL VISIBILITY: ACTIVE DEAL CLOSED/LOST							
AUTHORITY LEVEL	VIEW	MODIFY	VIEW	MODIFY	VIEW	MODIFY	VIEW
BUSINESS USER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUSINESS MANAGER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUSINESS ADMIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AUTHORITY LEVEL DEALS CREATE/ TIMELINE TASK TEMPLATE CREATE/ LIBRARY TEMPLATES SEARCH AUTHORITY LEVEL CREATE MODIFY DELETE VIEW DELETE VIEW DEALS DOCUMENT							
USER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MANAGER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/> <input type="button" value="CONTINUE"/>							

FIG. 5



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BUSINESS UNIT HIERARCHY		GO TO MARKET NAME
SFG	DIVISION/SUB DIVISION	
ENERGY	CREATE SUB DIVISION	ENERGY
COAL		COAL
GAS		NATURAL GAS
PIPELINE		PIPELINE
TELECOM	CREATE SUB DIVISION	TELE-COMMUNICATIONS
	CABLE	CABLE
	CELLULAR	CELLULAR & WIRELESS
	CREATE DIVISION	
		<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>

FIG. 6



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CREATE DIVISION PROFILE	
DIVISION NAME: GO TO MARKET NAME: HEADER GRAPHIC:	<input type="text" value="ENERGY"/> <input type="text" value="ENERGY"/> <input type="text" value="SFGLogo-GIF"/>
<b>BROWSE</b>	
DEAL VISIBILITY:	
AUTHORITY LEVEL	
DIVISION USER	<input checked="" type="checkbox"/> VIEW
DIVISION MANAGER	<input checked="" type="checkbox"/> ACTIVE DEAL
DIVISION ADMIN	<input checked="" type="checkbox"/> MODIFY
CLOSED/LOST	
VIEW	
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
CANCEL	
<input type="button" value="DONE"/>	

FIG. 7



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CREATE SUB-DIVISION PROFILE	
DIVISION NAME:	ENERGY
SUB-DIVISION NAME:	<input type="text"/> GAS
GO TO MARKET NAME:	<input type="text"/> NATURAL GAS
HEADER GRAPHIC:	<input type="text"/> SFGLogo-GIF <input type="button" value="BROWSE"/>
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>	

FIG. 8

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LIBRARY TEMPLATES					
DIVISIONS TO VIEW: <input checked="" type="checkbox"/> SELECT VIEW					
DIVISION: DIVISION 1	TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	REMOVE
NEW TEMPLATE FOR DIVISION 1		TRENT		01/01/2000	<input type="checkbox"/>
TEMPLATE 1	✓	TRENT		01/01/2000	<input type="checkbox"/>
TEMPLATE2		TRENT		01/01/2000	<input type="checkbox"/>
DIVISION: DIVISION 2	TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	REMOVE
TEMPLATE 1		JOHN		01/01/2000	<input type="checkbox"/>
TEMPLATE2	✓	TOM		01/01/2000	<input type="checkbox"/>
DIVISION: DIVISION 3	TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	REMOVE
TEMPLATE 1	✓	JOHN		01/01/2000	<input type="checkbox"/>
TEMPLATE2		JILL		01/01/2000	<input type="checkbox"/>
					<input checked="" type="checkbox"/> REMOVE
					<input checked="" type="checkbox"/> CREATE TEMPLATE

FIG. 9

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FIG. 10

CREATE/MODIFY LIBRARY TEMPLATE			
TEMPLATE NAME:	<input type="text"/>	DESCRIPTION:	<input type="text"/>
DIVISION:	<input checked="" type="checkbox"/> SELECT DIVISION	<input type="checkbox"/> DEFAULT TEMPLATE FOR DIVISION	
<p>© NAME OF TEMPLATE ROOT FOLDER</p> <p><input type="radio"/> FOLDER 1</p> <p><input type="radio"/> FOLDER 2</p> <p><input type="radio"/> FOLDER 3</p> <p><input type="radio"/> FOLDER 4</p>			
<input type="button" value="CREATE FOLDER"/>		<input type="button" value="REMOVE"/>	<input type="button" value="DONE"/>

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CREATE/MODIFY LIBRARY TEMPLATE FOLDER	
SUMMARY INFORMATION:	
PARENT FOLDER:	ROOT FOLDER <input type="button" value="SELECT"/>
FOLDER NAME:	<input type="text"/>
DESCRIPTION:	<input type="text"/>
<input type="checkbox"/> INHERITED FOLDER (NOTE: FILES PLACED INTO THIS FOLDER WILL AUTOMATICALLY INHERIT THE PERMISSIONS OF THIS FOLDER) <input type="checkbox"/> GE FOLDER (NOTE: THE SPONSORING GE BUSINESS USERS WILL BE AUTOMATICALLY PERMISSIONED ON THIS FOLDER)	
DEFAULT PERMISSION INFORMATION	
GROUP	PERMISSIONS
GE GROUP	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
CUSTOMER GROUP	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
OTHER	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>	

FIG. 11

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TEMPLATES						
DIVISION: DIVISION 1						
TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	COPY	REMOVE	DIVISIONS TO VIEW: <input checked="" type="checkbox"/> VIEW ALL DIVISIONS <input checked="" type="checkbox"/>
NEW TEMPLATE		TRENT	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TEMPLATE 1	✓	TRENT	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TEMPLATE 2		TRENT	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
DIVISION: DIVISION 2						
TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	COPY	REMOVE	
TEMPLATE 3		JOHN	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TEMPLATE 4	✓	TOM	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
DIVISION: DIVISION 3						
TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	COPY	REMOVE	
TEMPLATE 5	✓	JOHN	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TEMPLATE 6		JILL	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="CREATE TEMPLATE"/>						<input type="button" value="REMOVE"/>

FIG. 12



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CREATE/MODIFY TEMPLATE		NEW TEMPLATE	
TEMPLATE NAME: <input type="text"/>		DESCRIPTION: <input type="text"/>	
DIVISION: -SELECT ONE OF THE FOLLOWING- <input checked="" type="checkbox"/> <input type="checkbox"/>		DEFAULT TEMPLATE FOR DIVISION	
<input type="button" value="EXPAND ALL"/> <input type="button" value="COLLAPSE ALL"/>		CUSTOMER REQUEST DATE HIDE REMOVE	
<input type="checkbox"/> 1	MILESTONE NAME 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1	TASK NAME 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 2	TASK NAME 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1	SUB-TASK NAME 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 2	SUB-TASK NAME 2	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 2	MILESTONE NAME 2	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1	TASK NAME 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1	SUB-TASK NAME 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 3	MILESTONE NAME 3	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1	TASK NAME 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1	SUB-TASK NAME 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="SORT"/> <input type="button" value="CREATE MILESTONE"/> <input type="button" value="CREATE TASK"/> <input type="button" value="DONE"/> <input type="button" value="CANCEL"/> <input type="button" value="REMOVE"/>			

F T G . 1 3



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CREATE DEAL

SELECT THE FIRST LETTER: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z  
OR  
SEARCH: BEGINS WITH:  CONTAINS:

COMPANY NAME:   
LOADSURE  
EAGLE FINANCIAL  
XYZ DATA SYSTEMS

DEAL NAME:   
TIMELINE TEMPLATE:  DEFAULT TIMELINE TEMPLATE  
LIBRARY TEMPLATE:  DEFAULT LIBRARY TEMPLATE

F I G . 1 4

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VIEW PROJECT SUMMARY LOADSURE DEAL 2 - LOADSURE			SUMMARY WORK GROUP TASKS/TIMELINE DISCUSSIONS LIBRARY																						
<b>DEAL NAME:</b> LOADSURE DEAL 2 <b>DATE CREATED:</b> 10/14/00 <b>CLIENT PRIMARY CONTACT:</b> SHERYL <b>COMPANY NAME:</b> LOADSURE <b>TEAM LEAD:</b> TIM <b>PHONE NUMBER:</b> (317) 730-4691 <b>PHONE NUMBER:</b> (555) 132-4691			<b>MILESTONE SUMMARY</b> <table border="1"> <thead> <tr> <th>MILESTONE NAME</th> <th>CURRENT STATUS</th> <th>ORIGINAL REQUEST DATE</th> <th>CURRENT DUE DATE</th> <th>ACTUAL COMPLETION DATE</th> </tr> </thead> <tbody> <tr> <td>MILESTONE NUMBER 1</td> <td>IN PROGRESS</td> <td>12/7/01/2000</td> <td>12/15/2000</td> <td>NA</td> </tr> <tr> <td>MILESTONE NUMBER 2</td> <td>COMPLETED</td> <td>1/15/2000</td> <td>1/20/2000</td> <td>1/19/2000</td> </tr> <tr> <td>MILESTONE NUMBER 3</td> <td>COMPLETED</td> <td>1/15/2000</td> <td>1/20/2000</td> <td>1/19/2000</td> </tr> </tbody> </table>			MILESTONE NAME	CURRENT STATUS	ORIGINAL REQUEST DATE	CURRENT DUE DATE	ACTUAL COMPLETION DATE	MILESTONE NUMBER 1	IN PROGRESS	12/7/01/2000	12/15/2000	NA	MILESTONE NUMBER 2	COMPLETED	1/15/2000	1/20/2000	1/19/2000	MILESTONE NUMBER 3	COMPLETED	1/15/2000	1/20/2000	1/19/2000
MILESTONE NAME	CURRENT STATUS	ORIGINAL REQUEST DATE	CURRENT DUE DATE	ACTUAL COMPLETION DATE																					
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MILESTONE NUMBER 2	COMPLETED	1/15/2000	1/20/2000	1/19/2000																					
MILESTONE NUMBER 3	COMPLETED	1/15/2000	1/20/2000	1/19/2000																					
			<b>NOTIFICATIONS</b> <b>NOTIFICATION OF TASKS</b> <table border="1"> <thead> <tr> <th>DATE</th> <th>TYPE</th> <th>TITLE</th> </tr> </thead> <tbody> <tr> <td>1/23/00</td> <td>%</td> <td>UPLOAD LOADSTORE BUSINESS</td> </tr> <tr> <td>1/23/00</td> <td>%</td> <td>TASK ASSIGNED TO YOU</td> </tr> <tr> <td>1/23/00</td> <td>%</td> <td>CHANGE IN DUE DATE FOR</td> </tr> <tr> <td>1/23/00</td> <td>%</td> <td>TASK PAST DUE - ORIGINAL</td> </tr> </tbody> </table>			DATE	TYPE	TITLE	1/23/00	%	UPLOAD LOADSTORE BUSINESS	1/23/00	%	TASK ASSIGNED TO YOU	1/23/00	%	CHANGE IN DUE DATE FOR	1/23/00	%	TASK PAST DUE - ORIGINAL					
DATE	TYPE	TITLE																							
1/23/00	%	UPLOAD LOADSTORE BUSINESS																							
1/23/00	%	TASK ASSIGNED TO YOU																							
1/23/00	%	CHANGE IN DUE DATE FOR																							
1/23/00	%	TASK PAST DUE - ORIGINAL																							
			<b>NOTIFICATION OF DISCUSSIONS</b> <table border="1"> <thead> <tr> <th>DATE</th> <th>TYPE</th> <th>TITLE</th> </tr> </thead> <tbody> <tr> <td>1/23/00</td> <td>Q</td> <td>NEW DISCUSSION</td> </tr> <tr> <td>1/23/00</td> <td>Q</td> <td>UPDATED DISCUSSION</td> </tr> <tr> <td>1/23/00</td> <td>Q</td> <td>UPDATED DISCUSSION</td> </tr> </tbody> </table>			DATE	TYPE	TITLE	1/23/00	Q	NEW DISCUSSION	1/23/00	Q	UPDATED DISCUSSION	1/23/00	Q	UPDATED DISCUSSION								
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1/23/00	Q	NEW DISCUSSION																							
1/23/00	Q	UPDATED DISCUSSION																							
1/23/00	Q	UPDATED DISCUSSION																							
			<b>SHOW SINCE:</b> <input checked="" type="checkbox"/> MY LAST LOGIN <input type="checkbox"/> <b>NOTIFICATION OF DOCUMENTS</b> <table border="1"> <thead> <tr> <th>DATE</th> <th>TYPE</th> <th>TITLE</th> </tr> </thead> <tbody> <tr> <td>1/23/00</td> <td>Q</td> <td>NEW DOCUMENT</td> </tr> <tr> <td>1/23/00</td> <td>Q</td> <td>DOCUMENT CHANGED</td> </tr> <tr> <td>1/23/00</td> <td>Q</td> <td>NEW DOCUMENT</td> </tr> </tbody> </table>			DATE	TYPE	TITLE	1/23/00	Q	NEW DOCUMENT	1/23/00	Q	DOCUMENT CHANGED	1/23/00	Q	NEW DOCUMENT								
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1/23/00	Q	NEW DOCUMENT																							
1/23/00	Q	DOCUMENT CHANGED																							
1/23/00	Q	NEW DOCUMENT																							
			<b>ADDITIONAL SYSTEM NOTIFICATIONS</b> <table border="1"> <thead> <tr> <th>DATE</th> <th>TYPE</th> <th>TITLE</th> </tr> </thead> <tbody> <tr> <td>1/23/00</td> <td>V</td> <td>YOUR PASSWORD MUST BE CHANGED</td> </tr> <tr> <td>1/23/00</td> <td>V</td> <td>YOU HAVE BEEN ADDED TO THE</td> </tr> <tr> <td>1/23/00</td> <td>V</td> <td>NEW DEAL TEAM MEMBER</td> </tr> </tbody> </table>			DATE	TYPE	TITLE	1/23/00	V	YOUR PASSWORD MUST BE CHANGED	1/23/00	V	YOU HAVE BEEN ADDED TO THE	1/23/00	V	NEW DEAL TEAM MEMBER								
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1/23/00	V	YOUR PASSWORD MUST BE CHANGED																							
1/23/00	V	YOU HAVE BEEN ADDED TO THE																							
1/23/00	V	NEW DEAL TEAM MEMBER																							

FIG. 15



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MY DEALS

DIVISION TO FILTER ON: **SELECI  
OIVISION**

COMPANY	DEAL NAME	DIVISION	STATUS	TEAM LEAD	DATE CREATED
GARAGE TECH	GARAGE TECH PROJECT	TELECOM	WON		4/03/2000
LOAD SURE	LOAD SURE 2	ENERGY	OPEN		6/10/2000
MORRIS CO.	ENTERPRISE	TELECOM	ON HOLD		4/14/2000

12345

四庫全書



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CREATE/MODIFY WORK GROUP						
LOADSURE DEAL 2 - LOADSURE						
SUMMARY	DEAL TEAM	TASKS/TIMELINE	DISCUSSIONS	ALERTS	LIBRARY	PROFILE
				<input type="checkbox"/> COMPANIES TO VIEW:	<input checked="" type="checkbox"/> VIEW ALL COMPANIES	
COMPANY						
COMPANY ROLE:	<input checked="" type="checkbox"/> PROVIDER					
NAME	PRIMARY CONTACT	ACTIVE	ROLE	BUSINESS PHONE	EMAIL	REMOVE
	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPANY						
COMPANY ROLE:	<input checked="" type="checkbox"/> CUSTOMER					
NAME	PRIMARY CONTACT	ACTIVE	ROLE	BUSINESS PHONE	EMAIL	REMOVE
	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPANY						
COMPANY ROLE:	<input checked="" type="checkbox"/> INTERMEDIARY					
NAME	PRIMARY CONTACT	ACTIVE	ROLE	BUSINESS PHONE	EMAIL	REMOVE
	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADD COMPANY	<input type="checkbox"/> SAVE					REMOVE

FIG. 17



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SELECT COMPANY

SELECT THE FIRST LETTER: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z  
OR  
SEARCH: BEGINS WITH: ©  
CONTAINS: ○

SEARCH      NEW COMPANY

COMPANY NAME:  
LOADSURE  
EAGLE FINANCIAL  
XYZ DATA SYSTEMS

CANCEL      CONTINUE

FIG. 18



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COMPANY RELATIONSHIPS	
PERMISSIONS FOR: ENTERPRISES	
ADD TO DEAL GROUPS: <input type="radio"/> GE TEAM <input type="radio"/> CUSTOMER TEAM <input type="radio"/> OTHER <input type="radio"/> NONE	
SELECT THE COMPANIES ENTERPRISES CAN VIEW ON THE DEAL: NOTE: THIS COMPANY MAY ONLY VIEW GE AND THE COMPANIES CHECKED BELOW. RELATIONSHIPS ARE TWO-WAY.	
LOADSURE <input type="checkbox"/>	<input type="checkbox"/> BACK <input type="checkbox"/> DONE

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FIG. 19



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SELECT TEAM MEMBERS

GE CAPITAL AVAILABLE USER(S): JOE HANNA

SELECTED USER(S): BENNIE TIM JANE

FIG. 20



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MY PROFILE	
FIRST NAME:	[REDACTED]
LAST NAME:	[REDACTED]
JOB TITLE:	[REDACTED]
BUSINESS PHONE:	[REDACTED]
MOBILE PHONE:	[REDACTED]
FAX:	[REDACTED]
EMAIL ADDRESS:	[REDACTED]
EMPLOYING COMPANY:	<input type="button" value="SELECT COMPANY"/>
ADDRESS 1:	[REDACTED]
ADDRESS 2:	[REDACTED]
ADDRESS 3:	[REDACTED]
CITY/TOWN :	[REDACTED]
STATE/PROVINCE :	[REDACTED]
COUNTRY :	[REDACTED]
ZIP/POSTAL CODE :	[REDACTED]
DIVISION/SUB-DIVISION :	<input type="button" value="SELECT A DIVISION / SUB-DIVISION"/>
AUTHORITY LEVEL :	<input type="button" value="SELECT AN ACCESS LEVEL"/>
USER ID:	[REDACTED]
PASSWORD:	[REDACTED]
RETYPE PASSWORD:	[REDACTED]
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>	

FIG. 21



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FIG . 22

USER PROFILE

FIRST NAME:	<input type="text"/>	LAST NAME:	<input type="text"/>	JOB TITLE:	<input type="text"/>	DIVISION/SUB-DIVISION:	<input type="text"/>	AUTHORITY LEVEL:	<input type="text"/>	EXTENSION:	<input type="text"/>
BUSINESS PHONE:	<input type="text"/>	MOBILE PHONE:	<input type="text"/>	FAX:	<input type="text"/>	EMAIL ADDRESS:	<input type="text"/>	EMPLOYING COMPANY:	<input type="text"/>	SELECTED COMPANY	<input type="text"/>
ADDRESS 1:	<input type="text"/>	ADDRESS 2:	<input type="text"/>	ADDRESS 3:	<input type="text"/>	CITY/TOWN:	<input type="text"/>	STATE/PROVINCE:	<input type="text"/>	COUNTRY:	<input type="text"/>
ZIP/POSTAL CODE:	<input type="text"/>	USER ID:	<input type="text"/>	PASSWORD:	<input type="text"/>	RETYPE PASSWORD:	<input type="text"/>	RESET USER PASSWORD:	<input checked="" type="checkbox"/>	DISABLE LOGIC:	<input type="checkbox"/>
ADD CREDENTIALS:	<input type="checkbox"/>	DONE:	<input type="checkbox"/>	CANCEL:							



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FIG. 23

USER PROFILE	
NEW USER	
JOB TITLE :	MANAGER
BUSINESS PHONE :	444-555-9999
MOBILE PHONE :	444-555-9999
FAX:	444-555-9999
EMAIL ADDRESS:	USER@GKENTERPRISES.COM
EMPLOYING COMPANY:	G.K. ENTERPRISES
ADDRESS 1:	ADDRESS 1
ADDRESS 2:	ADDRESS 2
CITY/TOWN:	CITY/TOWN
STATE/PROVINCE:	STATE
ZIP/POSTAL CODE:	99999
COUNTRY:	COUNTRY
<input type="checkbox"/> DONE	



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COMPANY PROFILE									
COMPANY NAME:	<input type="text"/>	<input checked="" type="checkbox"/> CSS	<input type="text"/>						
COMPANY TYPE:									
ADDRESS 1:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ADDRESS 2:									
CITY/TOWN:									
STATE/PROVINCE:									
COUNTRY:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ZIP/POSTAL CODE:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
PHONE NUMBER:									
FAX NUMBER:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
WEB URL:									
LOGIC:									
UNKNOWN	<input type="button" value="ATTACH"/>	<input type="button" value="CLEAR"/>							
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>									

FIG. 24

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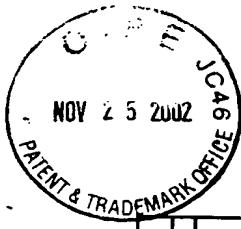


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COMPANY PROFILE	
G. K. ENTERPRISES	
ADDRESS 1:	ADDRESS 1
ADDRESS 2:	ADDRESS 2
CITY/TOWN:	CITY/TOWN
STATE/PROVINCE:	STATE
COUNTRY:	COUNTRY
ZIP/POSTAL CODE	9999
PHONE NUMBER:	444-555-9999
FAX NUMBER:	444-555-9999
WEB URL:	WWW.GKENTERPRISES.COM
<input type="button" value="DONE"/>	

FIG. 25



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<p>BRIEFING PAGE</p> <p><input type="button" value="EXPAND ALL"/></p> <p><input type="button" value="COLLAPSE ALL"/></p> <p>DEAL DASHBOARD</p> <p><input checked="" type="checkbox"/> LOADSURE DEAL 2</p> <p>LAST MILESTONE: PROPOSAL ACTUAL COMPLETION DATE: 15-DEC 2000 NEXT MILESTONE: APPROVAL CURRENT DUE DATE: 15-JAN-2001</p> <p>GE PRIMARY CONTACT: TIM CLIENT PRIMARY CONTACT: CHERYL</p> <p>PHONE NUMBER: 730-4691 PHONE NUMBER: 432-4691</p> <p>YOUR OUTSTANDING TASKS: 6</p> <p>NOTIFICATION SUMMARY: ⓘ §(2)(3)P(5)*§(2)</p> <p><input checked="" type="checkbox"/> INFORMATION-E INFO FINANCING</p> <p>LAST MILESTONE: PROPOSAL ACTUAL COMPLETION DATE: 01-JAN 2000 NEXT MILESTONE: APPROVAL CURRENT DUE DATE: 02-JAN-2001</p> <p>(CLICK HERE TO VIEW DETAILS FOR THIS DEAL.)</p> <p><input checked="" type="checkbox"/> SHIP IT DIRECT - E SHIP IT FINANCING</p> <p>LAST MILESTONE: PROPOSAL ACTUAL COMPLETION DATE: 01-JAN 2000 NEXT MILESTONE: APPROVAL CURRENT DUE DATE: 02-JAN-2001</p> <p>(CLICK HERE TO VIEW DETAILS FOR THIS DEAL.)</p> <p><input checked="" type="checkbox"/> SHOW - I SHOW FINANCING</p> <p>LAST MILESTONE: PROPOSAL ACTUAL COMPLETION DATE: 01-JAN 2000 NEXT MILESTONE: APPROVAL CURRENT DUE DATE: 02-JAN-2001</p> <p>(CLICK HERE TO VIEW DETAILS FOR THIS DEAL.)</p> <p>GE PRIMARY CONTACT: TODD CLIENT PRIMARY CONTACT: HENRY</p> <p>PHONE NUMBER: 730-4691 PHONE NUMBER: (555)432-4691</p> <p>YOUR OUTSTANDING TASKS: 5</p> <p>NOTIFICATION SUMMARY: ⓘ §(2)(3)P(5)*§(2)</p> <p><input type="checkbox"/> ALERTS: ⓘ <input checked="" type="checkbox"/></p> <p>NO NEW ALERTS SINCE MY LAST LOGIN</p> <p><input type="checkbox"/> DISCUSSION SUBSCRIPTIONS: ⓘ <input checked="" type="checkbox"/></p> <p>NO NEW DISCUSSION SUBSCRIPTIONS SINCE MY LAST LOGIN</p> <p><input type="checkbox"/> HOTLINKS <input checked="" type="checkbox"/></p> <p>NO NEW ITEMS SINCE MY LAST LOGIN</p> <p><input type="checkbox"/> INDEX CARD SUBSCRIPTIONS: ⓘ <input checked="" type="checkbox"/></p> <p>NO NEW SUBSCRIPTIONS SINCE MY LAST LOGIN</p> <p><input type="checkbox"/> NEWS <input checked="" type="checkbox"/></p> <p>TOP NEWS</p> <p>NO NEWS FOUND CORRESPONDING TO THIS SECTION.</p> <p><input type="checkbox"/> EDIT <input checked="" type="checkbox"/></p> <p><input type="checkbox"/> MY LAST LOGIN <input checked="" type="checkbox"/></p> <p><input type="checkbox"/> EDIT? <input checked="" type="checkbox"/></p> <p><input type="checkbox"/> EDIT <input checked="" type="checkbox"/></p>	<p>600</p> <p>FIG. 26</p>
--	---------------------------



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CREATE/MODIFY MILESTONE		MILESTONE :	DESCRIPTION:	<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>

FIG. 27



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CREATE/MODIFY MILESTONE													
MILESTONE:	<input type="text"/>												
HIDE FROM EXTERNAL PARTIES:	<input type="checkbox"/>												
STATUS:	<input checked="" type="checkbox"/> SELECT STATUS												
DESCRIPTION:	<input type="text"/>												
<table border="1"><thead><tr><th>CUSTOMER REQUEST DATE</th><th>ORIGINAL</th><th>CURRENT</th><th>ACTUAL COMPLETION DATE</th></tr></thead><tbody><tr><td><input type="text"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="text"/></td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr></tbody></table>		CUSTOMER REQUEST DATE	ORIGINAL	CURRENT	ACTUAL COMPLETION DATE	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CUSTOMER REQUEST DATE	ORIGINAL	CURRENT	ACTUAL COMPLETION DATE										
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>										
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>										
<input type="checkbox"/> DONE <input type="checkbox"/> CANCEL													

FIG. 28

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CREATE/MODIFY TASK	
PARENT MILESTONE:	MILESTONE 1
TASK:	<input type="text"/>
DESCRIPTION:	<input type="text"/>
SETTINGS:	<input type="checkbox"/> HIDE FROM EXTERNAL PARTIES <input type="checkbox"/> OMIT <input type="checkbox"/> PICK AN OWNER <input checked="" type="checkbox"/> SELECT STATUS
OWNER STATUS:	<input type="text"/> <input type="text"/>
ACTUAL COMPLETION DATE	
DUE DATE	<input type="text"/> <input type="text"/>
ORIGINAL	CURRENT
<input type="checkbox"/>	
ASSOCIATIONS:	<input type="text"/> ASSOCIATE <input type="checkbox"/> REMOVE: <input type="checkbox"/> DONE <input type="checkbox"/> CANCEL

FIG. 29

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CREATE/MODIFY TASK	
MILESTONE:	QUALIFIED LEAD
TASK:	<input type="text"/>
DESCRIPTION:	<input type="text"/>
ASSOCIATIONS:	<u>ASSOCIATE</u> <input type="text"/>
<input type="button" value="REMOVE"/> <input type="button" value="DONE"/> <input type="button" value="CANCEL"/>	

FIG. 30

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CREATE/MODIFY SUB-TASK			
MILESTONE:	QUALIFIED LEAD		
TASK:	ID CUSTOMER CTQ'S		
SUB-TASK	<input type="checkbox"/>		
DESCRIPTION:	<input type="checkbox"/> <input type="checkbox"/>		
		ASSOCIATIONS:	<input type="checkbox"/> ASSOCIATE
		<input type="checkbox"/> REMOVE <input type="checkbox"/> DONE <input type="checkbox"/> CANCEL	

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SUMMARY	DEAL	TEAM	TASKS/TIMELINE	DISCUSSIONS	ALERTS	LIBRARY	PROFILE
<input type="button" value="EXPAND ALL"/>	<input type="button" value="COLLAPSE ALL"/>	CUSTOMER REQUEST DATE	CURRENT DUE DATE	OWNER	HIDE FROM EXTERNAL PARTIES		
MILESTONE NAME 1						<input type="checkbox"/>	<input type="checkbox"/>
TASK NAME 1						<input type="checkbox"/>	<input type="checkbox"/>
TASK NAME 2						<input type="checkbox"/>	<input type="checkbox"/>
SUB-TASK NAME 1						<input type="checkbox"/>	<input type="checkbox"/>
SUB-TASK NAME 2						<input type="checkbox"/>	<input type="checkbox"/>
MILESTONE NAME 1						<input type="checkbox"/>	<input type="checkbox"/>
TASK NAME 1						<input type="checkbox"/>	<input type="checkbox"/>
SUB-TASK NAME 1						<input type="checkbox"/>	<input type="checkbox"/>
MILESTONE NAME 2						<input type="checkbox"/>	<input type="checkbox"/>
TASK NAME 1						<input type="checkbox"/>	<input type="checkbox"/>
SUB-TASK NAME 1						<input type="checkbox"/>	<input type="checkbox"/>
DONE						<input type="checkbox"/>	<input type="checkbox"/>
CANCEL							

FIG . 32

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TASK NOTIFICATION	
<p>SEND TASK NOTIFICATIONS THROUGH EMAIL</p> <p>YES      NO</p> <p>SETTINGS FOR TASKS THAT I ASSIGN TO OTHERS:</p> <p><input checked="" type="checkbox"/> NOTIFY ME WHEN TASK IS OVERDUE</p> <p><input type="checkbox"/> NOTIFY ME WHEN TASK IS REASSIGNED</p> <p><input type="checkbox"/> NOTIFY ME WHEN DUE DATE IS CHANGED</p> <p><input type="checkbox"/> NOTIFY ME WHEN A TASK IS COMPLETE</p> <p>SETTINGS FOR TASKS THAT I AM ASSIGNED</p> <p><input type="checkbox"/> SEND TASK REMINDERS ON TASKS THAT I AM ASSIGNED</p> <p><input type="checkbox"/> SEND FIRST NOTICE <u>1</u> DAY(S) BEFORE A TASK IS DUE</p> <p><input type="checkbox"/> SEND FOLLOW-UP REMINDERS <u>EVERY DAY</u> UNTIL THE TASK IS COMPLETE</p> <p><input checked="" type="checkbox"/> DO NOT SEND TASK REMINDERS ON TASKS THAT I AM ASSIGNED</p> <p>SEND ALERT NOTIFICATION THROUGH EMAIL</p> <p>YES      NO</p> <p><input type="checkbox"/> SAVE      <input checked="" type="checkbox"/> CLOSE</p>	

FIG. 33



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 AND MANAGING DEALS  
 John S. Beulick; Armstrong Teasdale LLP  
 One Metropolitan Square, Suite 2600, St. Louis, MO 63102 (314) 621-5070

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TASKS/TIMELINE		LOADSURE DEAL 2 - LOADSURE													
SUMMARY	DEAL TEAM	TASKS/TIMELINE	DISCUSSIONS	ALERTS	LIBRARY	PROFILE	ACTUAL	DATE	COMPLETION	ORIGINAL	CURRENT	DATE	STATUS	HIDE	OMIT
EXPAND ALL	COLLAPSE ALL	CUSTOMER OWNER	REQUEST DATE												
<input type="checkbox"/> MILESTONE NAME 1															
<input type="checkbox"/> TASK NAME 1															
<input type="checkbox"/> TASK NAME 2															
	SUB-TASK NAME 1														
	SUB-TASK NAME 2														
<input type="checkbox"/> MILESTONE NAME 1															
<input type="checkbox"/> TASK NAME 1															
	SUB-TASK NAME 1														
	SUB-TASK NAME 2														
<input type="checkbox"/> MILESTONE NAME 2															
<input type="checkbox"/> TASK NAME 1															
	SUB-TASK NAME 1														
	SUB-TASK NAME 1														
<b>[ASSIGN]</b>	<b>[CREATE TASK]</b>														

FIG. 34



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CREATE DISCUSSION	
DISCUSSION INFORMATION	
SUBJECT:	<input type="text"/>
DETAILS:	<input type="text"/>
DISCUSSION PARTICIPATION INFORMATION	
SELECT USERS AND GROUPS	
USER/GROUP	DISCUSSION PARTICIPATION
	<input type="checkbox"/> SELECT PARTICIPATION LEVEL
	<input type="checkbox"/> REMOVE
ASSOCIATION INFORMATION	
ADD ASSOCIATIONS:	
SELECT FROM	<input checked="" type="checkbox"/> GO
<input type="checkbox"/> DONE	<input type="checkbox"/> CANCEL

FIG . 35



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VIEW DISCUSSION       BACK     MANAGE ACCESS     DELETE     EXPAND ALL     COLLAPSE ALL

- RFO FOR HYDROGEN CHLORIDE? TIM INTELICO 23-JUN-2000  
ONOT YET. I HAVE A FEW QUESTIONS FIRST. LUKE GENCHEM 26-JUN-2000  
OWE WOULD NEED AN INITIAL SHIPMENT OF 10. 000KG. BUT FROM THEN ON IT WOULD BE A WEEKLY  
SHIPMENT OF 5. 000KG HOLLY INTELICO 23-JUN-2000  
TWICE A WEEK WOULD BE GREAT. IF POSSIBLE SAM INTELICO 23-JUN-2000
- O CLARIFICATION ON RFO DETAILS LUKE GENCHEM 25-JUN 2000  
OYES. THE HYDROGEN CHLORIDE CAN BE SHIPPED WITH THE OTHER ITEMS. NO NEED FOR SPECIAL  
HANDLING TIM INTELICO 23-JUN-2000

REPLY

ASSOCIATIONS:  SELECT ITEM FROM  ADD SELECTED  REMOVE  
 SAMPLE CATALOG DOCUMENT

FIG. 36



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FEEDBACK	SUBMIT
SEND TO: REGARDING:	DEAL TEAM LEAD <input checked="" type="checkbox"/> DEAL STATUS <input type="checkbox"/> PLEASE CONTACT ME WITH REGARDS TO THE ABOVE DETAILS
DESCRIPTION:	<input type="button" value="SUBMIT"/> <input type="button" value="CANCEL"/>

FIG. 37

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FEEDBACK

YOUR FEEDBACK HAS BEEN SUCCESSFULLY SENT. WE HIGHLY VALUE YOUR  
OBSERVATIONS AND SUGGESTIONS.

THANK YOU

THANK YOU FOR TAKING THE TIME TO GIVE US VALUABLE FEEDBACK.  
PLEASE FEEL FREE TO GIVE US FEEDBACK AT ANY POINT OF YOUR RELATIONSHIP  
WITH US. YOUR OPINION MEANS A LOT.

CLOSE

FIG. 38



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FEEDBACK		DATE	REGARDING	COMMENTS
SENT FROM	VOC RECEIVED			
JULIE		01/20/01	DEAL STATUS	ENTER TEXT IS DISPLAYED HERE IN THIS COLUMN THIS IS THE TEXT THAT IS GIVEN
FRED		01/20/01	DEAL STATUS	THIS IS THE TEXT FIELD THAT IS USED TO DISPLAY THE INFORMATION AS IT WAS ENTERED ON THE FORM
HILLARY		01/20/01	DEAL STATUS	ENTER TEXT IS DISPLAYED HERE

FIG . 39



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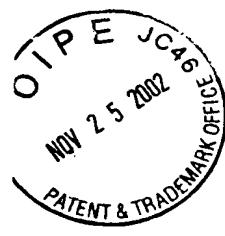
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VIEW LIBRARY	LOADSURE DEAL 2 - LOADSURE	SUMMARY	WORK GROUP	TASKS/TIMELINE	DISCUSSIONS	LIBRARY
<b>[EXPAND ALL] [COLLAPSE ALL]</b> SHOW FLAGS FOR ITEMS WHICH ARE NEW/UPDATES IN THE LAST <b>[LAST LOGIN]</b> <input checked="" type="checkbox"/>						
<input type="checkbox"/> COMPANY FOLDER <input type="checkbox"/> DUE DILIGENCE <input type="checkbox"/> LEGAL <input type="checkbox"/> FINANCIAL <input type="checkbox"/> CLOSING						
<b>[ADD CONTENT]</b> <b>[CREATE FOLDER]</b>						

FIG. 40



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CREATE/MODIFY	
CATEGORY	
<u>SUMMARY INFORMATION</u>	
PARENT FOLDER: DUE DILIGENCE <input type="button" value="SELECT"/>	
FOLDER NAME: <input type="text"/>	
DESCRIPTION: <input type="text"/>	
<input checked="" type="checkbox"/> INHERITED FOLDER	
<u>PERMISSION INFORMATION</u>	
<u>SELECT USERS AND GROUPS</u>	
USER/GROUP	
GE GROUP	<input type="checkbox"/> VIEW, EDIT PERMISSION <input checked="" type="checkbox"/>
CUSTOMER GROUP	<input type="checkbox"/> VIEW, EDIT <input checked="" type="checkbox"/>
OTHER GROUP	<input type="checkbox"/> VIEW <input checked="" type="checkbox"/>
USER 1	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
USER 2	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
USER 3	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
<input type="button" value="REMOVE"/>	
<input type="button" value="DONE"/>	
<input type="button" value="CANCEL"/>	

FIG. 41

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F I G . 4 2

INDEX CARD			
SUBSCRIBED: <input type="checkbox"/>			
STEP 1: ENTER FILE NAME AND DESCRIPTION			
FILE NAME:	<input type="text"/>		
DESCRIPTION:	<input type="text"/>		
STEP 2: SELECT FILE FROM LOCAL SYSTEM OR ENTER A URL			
FILE PATH:	<input type="text"/> <input type="button" value="BROWSE"/>		
URL FULL URL:	<input type="text"/>		
STEP 3: SELECT A TARGET FOLDER FOR THE FILE			
TARGET FOLDER FOR FILE:	<input type="button" value="SELECT"/>		
DUE DILIGENCE			
STEP 4: ADD ASSOCIATIONS TO THE FILE			
SELECT FROM <input type="checkbox"/>	<input type="button" value="SELECT"/>		
REMOVE	<input type="button"/>		
STEP 5: PERMISSION USERS AND GROUPS ON THE FILE			
SELECT USERS AND GROUPS			
USER/GROUP	PERMISSIONS	NOTIFY	REMOVE
USER 1	<input type="checkbox"/> VIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
USER 2	<input type="checkbox"/> VIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GROUP 3	<input type="checkbox"/> VIEW, EDIT	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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INDEX CARD	
SUMMARY INFORMATION:	<input type="checkbox"/> SUBSCRIBED: <input type="checkbox"/>
FILE NAME:	LEGAL.DOC <input type="checkbox"/>
DESCRIPTION:	THESE ARE THE LEGAL RAMIFICATIONS OF THE DEAL <input type="checkbox"/>
STATUS:	CHECKED-IN <input type="checkbox"/>
VERSION INFORMATION:	<input type="checkbox"/>
# LAST MODIFIED MODIFIED BY	<input type="checkbox"/> COMMENTS <input type="checkbox"/> REMOVE
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CHECK OUT	<input type="checkbox"/> LOCKDOWN DOCUMENT <input type="checkbox"/> REMOVE
TARGET FOLDER INFORMATION:	<input type="checkbox"/> SELECT
TARGET FOLDER FOR FILE	<input type="checkbox"/> SELECT
DUE DILIGENCE	<input type="checkbox"/>
ASSOCIATION INFORMATION:	<input type="checkbox"/> SELECT FROM <input checked="" type="checkbox"/> <input type="checkbox"/> SELECT
BUSINESSPLAN.DOC	<input type="checkbox"/> <input type="checkbox"/> REMOVE
PERMISSION INFORMATION:	<input type="checkbox"/>
SELECT USERS AND GROUPS	<input type="checkbox"/>
USER/GROUP	PERMISSIONS <input type="checkbox"/> NOTIFY <input type="checkbox"/> REMOVE

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VIEW PROFILE		SUMMARY	WORK GROUP	TASKS/TIMELINE	DISCUSSIONS	LIBRARY	PROFILE
		<input type="checkbox"/> CONFIDENTIAL DEAL					
		PROFILE:					
DEAL STATUS	<input type="checkbox"/> SELECT DEAL STATUS	<input checked="" type="checkbox"/> DESCRIPTION:	<input type="text"/>	VENTURE COMPLETE DEAL ID	<input type="text"/>		
DEAL TYPE	<input checked="" type="checkbox"/> SELECT DEAL TYPE			DIVISION	<input type="checkbox"/> SELECT DIVISION		
TOTAL DEAL SIZE/ROUND	<input type="text"/> 0.0 ( IN US\$MM )			SUB-DIVISION	<input type="checkbox"/> SELECT SUB-DIVISION		
COMPANY DESCRIPTION	<input type="text"/>						
		<input type="button"/> CANCEL	<input type="button"/> SAVE	VOC SUMMARY			

FIG. 45

## SEARCH PREFERENCES

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DEAL ID:	<input type="text"/>	SEARCH OPTIONS O BEGINS WITH O INCLUDES
DEAL NAME :	<input type="text"/>	SEARCH OPTIONS O BEGINS WITH O INCLUDES
COMPANY NAME :	<input type="text"/>	
COMPANY ROLE:	<input type="checkbox"/> SELECT COMPANY ROLE <input checked="" type="checkbox"/>	
DEAL STATUS:	<input type="checkbox"/> SELECT DEAL STATUS <input checked="" type="checkbox"/>	FROM <input type="text"/> TO <input type="text"/>
SFG SOURCED:	<input type="text"/> 0.0	TOTAL <input type="text"/> 0.0
DEAL TEAM LEAD:	<input type="text"/>	LAST NAME <input type="text"/>
DEAL TEAM MEMBER:	<input type="text"/>	LAST NAME <input type="text"/>
COUNTRY/RISK	<input type="checkbox"/> SELECT COUNTRY/RISK <input checked="" type="checkbox"/>	
DIVISION	<input type="checkbox"/> SELECT DIVISION <input checked="" type="checkbox"/>	
SUB-DIVISION	<input type="checkbox"/> SELECT SUB-DIVISION <input checked="" type="checkbox"/>	
PRODUCT	<input type="checkbox"/> COMMON STOCK EQUITY-CURRENT EARNING EQUITY NOT-CURRENT EARNING LEVERAGED LEASE LIMITED PARTNERSHIP	<input type="checkbox"/> CHECK TO RECEIVE DEALS THAT CONTAIN ALL SELECTED PRODUCTS
	<input type="button" value="SEARCH"/>	<input type="button" value="RESET"/>

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FIG. 46

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SEARCH RESULTS

RECORDS (1-15 OF 427)  
SEARCH CRITERIA: DEAL STATUS = ACTIVE. COMPANY NAME = "LO"  
MODIFY SEARCH CRITERIA

NEXT>>

GE PRIMARY  
CONTACT

SUB-  
DIVISION

DIVISION

CREATED

STATUS

ROLE

COMPANY

NAME

DEAL ID

SEARCH CRITERIA

DEAL ID	DEAL NAME	COMPANY NAME	COMPANY ROLE	DATE CREATED	STATUS	DIVISION	SUB-DIVISION	GE PRIMARY CONTACT	NEXT>>
1111	LOADSURE								
	PRODUCTS								
1233	LONGI								
	PRODUCTS								
1236	LOEWCO1								
	PRODUCTS								
1334	LORDCO1								
	PRODUCTS								
2334	LOSTSYSTEMS1								
	PRODUCTS								
2458	LOB1								
	PRODUCTS								
2587	LONDON1								
	PRODUCTS								
3455	LOVLAND1								
	PRODUCTS								

DEAL ID	DEAL NAME	COMPANY NAME	COMPANY ROLE	DATE CREATED	STATUS	DIVISION	SUB-DIVISION	GE PRIMARY CONTACT	NEXT>>

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FIG. 48

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GE HOME	CEF HOME	HELP
SYSTEM ADMINISTRATOR		
BRIEFING PAGE		
▷ CATALOG	▷ ALERTS	▷ DISCUSSIONS
▷ TASKS	▷ INDUSTRY TEMPLATE	▷ CUSTOMERS
MY CUSTOMERS	INVITE CUSTOMERS	INVITE CUSTOMERS
▷ MY GE SERVICES	▷ NEWS	▷ ADMIN
LOGOUT		
CUSTOMER INFORMATION		
COMPANY: <input type="text"/>	SELECT COMPANY <input type="button" value="ADD"/>	
PROSPECT: <input type="text"/>		
LOCATION: <input type="text"/>		
(CITY) <input type="text"/>		
(STATE) <input type="text"/>		
USERNAME: <input type="text"/>	(FIRST NAME) <input type="text"/>	
TELEPHONE: <input type="text"/>	(LAST NAME) <input type="text"/>	
EMAIL: <input type="text"/>		
INDUSTRY TEMPLATES		
SELECT INDUSTRY NAME <input type="text"/>	PERSONALIZE <input type="button"/>	
UPLOAD CUSTOM ATTACHMENTS:		
FROM CATALOG: <input type="button" value="ADD"/>		
FROM DRIVE: <input type="button" value="ADD"/>		
NEW PORTAL USER POP-UP MESSAGE		
<input checked="" type="checkbox"/> USE DEFAULT MESSAGE		
SUBJECT: <input type="text"/>		
DETAILS: <input type="text"/>		



Applicant: Hornick et al. Serial No: 09/771,358 Atty. Dkt. No: 17243-00035  
Title: METHODS AND SYSTEMS FOR IDENTIFYING PROSPECTIVE CUSTOMERS  
AND MANAGING DEALS  
John S. Beulick; Armstrong Teasdale LLP  
One Metropolitan Square, Suite 2600, St. Louis, MO 63102 (314) 621-5070

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<a href="#">GE HOME</a>	<a href="#">CEF HOME</a>
<a href="#">SYSTEM ADMINISTRATOR</a>	
<a href="#">BRIEFING PAGE</a>	
<a href="#">▷ CATALOG</a>	
<a href="#">▷ ALERTS</a>	
<a href="#">▷ DISCUSSIONS</a>	
<a href="#">▷ TASKS</a>	
<a href="#">▷ INDUSTRY TEMPLATE</a>	
<a href="#">▷ CUSTOMERS</a>	
<a href="#">MY CUSTOMERS</a>	<a href="#">INVITE CUSTOMERS</a>
<a href="#">▷ MY GE SERVICES</a>	
<a href="#">▷ NEWS</a>	
<a href="#">▷ ADMIN</a>	
<a href="#">LOGOUT</a>	
NEW PORTAL USER POP-UP MESSAGE	
<input checked="" type="checkbox"/> USE DEFAULT MESSAGE <b>SUBJECT:</b> <input type="text"/>	
<b>DETAILS:</b> <input type="text"/>	
SALES REPRESENTATIVE SELECTOR	
<input type="checkbox"/> SYSTEM ADMINISTRATOR <input checked="" type="checkbox"/> ASSIGN	
PORTAL INFORMATION	
IRL : <input type="text"/> www.mygeoffice.com USERNAME : <input type="text"/> PWD : <input type="text"/>	
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>	

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GE CAPITAL LOGON | PREFERENCES | HELP | SEARCH  
COMMERCIAL FINANCE CONTACT 

HOME 

SETUP GATEWAY 

CUSTOMER ACTIVITY 

RESOURCES 

COMPANY STATUS 

CONTENT CENTRAL 

SETUP GATEWAY

Below are the most frequently used tools for creating and maintaining customer gateways.

- QUICK SETUP
- CUSTOM SETUP
- UPLOAD A DOCUMENT
- REMOVE A DOCUMENT
- MODIFY EXISTING CUSTOMER GATEWAY
- PREVIEW CUSTOMER GATEWAY
- DELETE CUSTOMER GATEWAY

CUSTOMER ACTIVITY

- MOST ACTIVE USERS
- GATEWAYS BY COMPANY
- GATEWAYS BY USER
- SESSION ACTIVITY

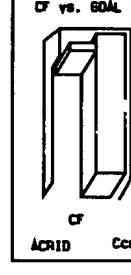
RESOURCES

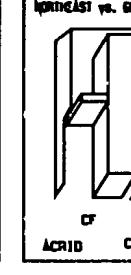
- KEY INTEREST RATES
- EDGARSCAN™
- THE E-DOCTOR
- AICPA PUBLICATIONS INDEX
- FINANCIALWEB.COM COMPANY PROFILES
- HOOVERS.COM COMPANY CAPSULES

WHAT'S NEW AT CF

THE NORTH EAST REGION LEADS IN SALES THROUGH THE END OF Q2 AND APPEARS TO HAVE A STRONG LEAD MIDWAY THROUGH Q2. THE BZ CREDIT GROUP SHOWS A 12% INCREASE IN TRANSACTIONS AS COMPARED TO Q3 '99. COMPANY SIDE, DONE DEALS NOW AVERAGE 3.1 DEALS PER ORIGINATOR. WE'RE ON OUR WAY TO A RECORD BREAKING, HISTORY MAKING YEAR. KEEP IT UP.

COMPANY STATUS

  
CF vs. GOAL  
ACRIS CCO

  
North East vs. SoCal  
ACRIS CCO

CONTENT CENTRAL

- GE TOOLS & TOURS
- CASE STUDIES
- GATEWAY RESOURCES

MORE RESOURCES

GE HOME | GE BUSINESSES | SMALL BUSINESS | INDUSTRY SOLUTIONS  
HOME SOLUTIONS | PERSONAL FINANCE | CORPORATE INFO

1100

FIG. 50

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GE CAPITAL LOGON|PREFERENCES|HELP|SEARCH  
COMMERCIAL FINANCE CONTACT

HOME   
SETUP GATEWAY   
CUSTOMER ACTIVITY   
RESOURCES   
COMPANY STATUS   
CONTENT CENTRAL

SETUP GATEWAY: CUSTOM SETUP  
FIELD WITH \* ARE REQUIRED.

REQUIRED INFORMATION:

\*EMAIL BUSINESS/LOGIN ID:   
\*ZIP CODE:   
\*PRIMARY INDUSTRY:    
\*COMPANY NAME:   
\*TYPE OF FINANCING NEED:

LOGIN INFORMATION:

\*PASSWORD:

COMPANY INFORMATION:

SIZE OF FINANCING NEED:    
STATUS:    
# EMPLOYEES:   
SALES SIZE:   
% INTERNATIONAL SALES    
# YEARS IN BUSINESS:   
CURRENT TYPES OF FINANCING USED:    
TIMING OF ADDITIONAL FINANCE NEED:    
FINANCING PRODUCT:    
ASSET CONCENTRATION:

CONTACT INFORMATION:

PREFIX:   
FIRST NAME:   
MIDDLE INITIAL:   
LAST NAME:   
STREET ADDRESS 1:   
STREET ADDRESS 2:   
CITY:   
STATE:   
PROVINCE:   
COUNTY:   
COUNTRY:   
PHONE BUSINESS:   
EXTENSION:   
FAX BUSINESS:   
TITLE:

REGISTER CLEAR



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GE CAPITAL | LOGON | PREFERENCES | HELP | SEARCH  
COMMERCIAL FINANCE

CONTACT

- HOME
- CASE STUDIES
- RESOURCES
- GE TOOLS & TOURS
- DOCUMENT CONTROL

PROSPECT INC GATEWAY

MESSAGE CENTER

THIS IS A DEFAULT MESSAGE WHEN NO REAL MESSAGES ARE THERE IN INBOX. THIS CAN BE CHANGED THROUGH OCC WELCOME TO A PERSONALIZED SERVICE THAT PROVIDES YOU WITH IMMEDIATE ACCESS TO GE EXPERTISE BASED UPON YOUR SPECIFIC BUSINESS.

CASE STUDIES

MOLD & TOOL

MOLD & TOOL HAS A MULTI-LAYERED FINANCIAL RELATIONSHIP WITH GE CAPITAL COMMERCIAL FINANCE, WHICH CURRENTLY HELPED IT REFINE

FULL CASE STUDY

OTHER RELATED CASE STUDIES:

SEAFOOD  
TECHNOLOGIES

SHOW ALL CASE STUDIES

RESOURCES

HERE YOU CAN FIND NEWS, TRENDS AND USEFUL INFORMATION TO HELP YOU MAKE BETTER BUSINESS DECISIONS.

- DONE DEALS
- TODAY'S BUSINESS NEWS
- GLOSSARY

SHOW ALL RESOURCES

SPOTLIGHT FEATURE

MONDAY FEATURE

SIX SIGMA

TODAY'S COMPETITIVE ENVIRONMENT LEAVES NO ROOM FOR ERROR. WE MUST DELIGHT OUR CUSTOMERS AND RELENTLESSLY LOOK FOR NEW WAYS TO EXCEED THEIR EXPECTATIONS. THIS IS WHY SIX SIGMA QUALITY HAS BECOME A PART OF OUR CULTURE.

GE TOOLS & TOURS

AS A GE CUSTOMER YOU WILL HAVE ACCESS TO EXCLUSIVE TOOLS AND INFORMATION DESIGNED TO STREAMLINE THE FINANCING PROCESS

CREDIT LINE CALCULATOR

GAUGE HOW MUCH YOU CAN BORROW FROM COMMERCIAL FINANCE

GE LINK DEMO

EXCHANGE DOCUMENTS TO GET MORE EFFICIENT TO CREDIT FACILITIES.

MYGEODEAL.COM (WORKFLOW) DEMO

VIEW A DEMO OF YOUR EXCLUSIVE SYSTEM FOR EXPEDITING YOUR FINANCING

SHOW ALL GE TOOLS & TOURS

DOCUMENT CENTRAL

WELCOME LETTER	
PRESENTATION1	10/12/00
DOCUMENT1	10/13/00
PRESENTATION2	10/12/00
DOCUMENT2	10/12/00

SHOW ALL DOCUMENTS IN MY DOCUMENT CENTRAL

GE HOME | GE BUSINESSES | SMALL BUSINESS | INDUSTRY SOLUTIONS  
HOME SOLUTIONS | PERSONAL FINANCES | CORPORATE INFO

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FIG. 52



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GE CAPITAL LOGON | PREFERENCES | HELP | SEARCH  
COMMERCIAL FINANCE

MY CONTACTS

- HOME
- GE TOOLS & TOURS
- RESOURCES
- GE CAPITAL BUSINESSES
- DOCUMENT CONTROL
- CUSTOMER CENTRAL

MESSAGE CENTER

WELCOME TO YOUR GATEWAY PAGE. A PERSONALIZED SERVICE THAT PROVIDES YOU WITH IMMEDIATE ACCESS TO GE EXPERTISE BASED UPON YOUR SPECIFIC NEEDS. IF YOU HAVE ANY QUESTIONS, YOUR REP IS JUST A CLICK AWAY.

TOOLS & TOURS

AS A GE CUSTOMER YOU WILL HAVE  
ACCESS TO EXCLUSIVE TOOLS AND  
INFORMATION DESIGNED TO  
STREAMLINE THE FINANCING PROCESS.

MYGEDEAL.COM DEMO

VIEW A DEMO OF OUR EXCLUSIVE SYSTEM FOR  
EXPEDITING YOUR FINANCING.

GE LINK DEMO

EXCLUSIVE DOCUMENTS TO GET MORE EFFICIENT  
ACCESS TO CREDIT FACILITIES.

CREDIT LINE CALCULATOR

GAUGE HOW MUCH YOU CAN BORROW FROM  
COMMERCIAL FINANCE

SHOW ALL GE TOOLS & TOURS

RESOURCES

- DONE DEALS
- FREQUENTLY ASKED  
QUESTIONS

MORE RESOURCES

CUSTOMER CENTRAL

- HOTLINK TO THE  
CUSTOMER ADVOCATE  
(SUGGESTIONS, ISSUES, COMPLAINTS)

• NEW SURVEY

(A FEW QUESTIONS TO HELP US IN  
THE RIGHT DECISION)

COMPANY INCORPORATED GATEWAY

SPOTLIGHT FEATURE

PERIODICALLY UPDATED NEWS/MARKETING CONTENT  
POSSIBLE ITEMS INCLUDE:

- JACK WELCH'S  
SHAREHOLDER LETTER
- BUSINESS CREDIT  
ADVISORY SERVICES

GE CAPITAL BUSINESSES

CROSS-SELLING AREA, INCLUDING:

- FEATURED BUSINESS  
(FOR EXAMPLE, COMMERCIAL EQUIPMENT FINANCING)  
WITH BRIEF DESCRIPTIONS NOTATED DYNAMICALLY
- LIST OF 2-3 OTHER  
COMPANIES

EACH LINKING OUT TO A MORE DETAILED  
DESCRIPTION

DOCUMENT CENTRAL

ADVANTAGE OF REVOLVERS	9/15/00
REVOLVER APPLICATION	9/8/00
CF ASSET BASED LENDING GUIDE	9/2/00
SIX SIGMA	9/31/00

SHOW ALL DOCUMENTS IN FILING CABINET

GE HOME | GE BUSINESSES | SMALL BUSINESS | INDUSTRY SOLUTIONS  
HOME SOLUTIONS | PERSONAL FINANCES | CORPORATE INFO

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FIG. 53



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GE CAPITAL LOGON | PREFERENCES | HELP | SEARCH  
COMMERCIAL FINANCE

MY CONTACTS

HOME  
TRANSACTION LIBRARY

LNK1  
LNK2  
LNK3  
LNK4

SHOW ALL TRANSACTIONS  
FINANCIAL SOLUTIONS CENTER

LNK1  
LNK2  
LNK3  
LNK4

FEATURED PRODUCT  
GE CAPITAL BUSINESSES

LNK1  
LNK2  
LNK3  
LNK4

FEATURED BUSINESS  
CASE STUDIES

SWIT TECHNOLOGIES  
ENVIRONMENTAL INDUSTRIES  
VISTA FOOD EXCHANGE  
SHOW ALL CASE STUDIES  
RESOURCES

LNK1  
LNK2  
LNK3  
LNK4

SHOW ALL RESOURCES  
DOCUMENT CENTRAL  
SHOW ALL DOCUMENTS

RESOURCES

HERE YOU CAN FIND NEWS, TRENDS AND USEFUL  
INFORMATION TO HELP YOU MAKE BETTER  
BUSINESS DECISIONS

- DONE DEALS
- FREQUENTLY ASKED  
QUESTIONS
- TODAY'S BUSINESS NEWS

MORE RESOURCES

COMPANY INCORPORATED GATEWAY

MESSAGE CENTER

WELCOME TO OUR GATEWAY PAGE. A PERSONALIZED SERVICE THAT PROVIDES YOU  
WITH IMMEDIATE ACCESS TO GE EXPERTISE BASED UPON YOUR SPECIFIC BUSINESS  
NEEDS. IF YOU HAVE ANY QUESTIONS, YOUR REP IS JUST A CLICK AWAY.

TRANSACTION LIBRARY

SHOW ALL CF TRANSACTIONS

LISTING OF MOST RECENT OR MOST RELEVANT GE DEALS, AS DETERMINED BY  
ORIGINATOR OR INTERMEDIARY CUSTOMIZATION.

FINANCIAL SOLUTIONS CENTER

CF PRODUCT OFFERINGS

- FEATURED PRODUCT WITH BRIEF DESCRIPTION  
NOTATED DYNAMICALLY
- LIST OF OTHER PRODUCTS EACH LINKING OUT  
TO A MORE DETAILED DESCRIPTION

CASE STUDIES

CAPITAL BUSINESSES

TECHNOLOGIES

FACING A LIQUIDITY CRISIS, THE  
COMPANY THAT BECAME TECHNOLOGIES  
TURNED TO GE CAPITAL COMMERCIAL  
FINANCE. FIRST TO QUICLY PROVIDE  
THE SUPPORT NEEDED TO REGAIN  
PROFITABILITY AND THEN TO FINANCE  
ITS CONTINUED AND SUCCESSFUL GROWTH  
READ THE FULL CASE STUDY

• FEATURED BUSINESS

• LIST OF 2-3 OTHER  
COMPANIES

VIDEO: REALPLAYER

VIDEO: WINDOWS MEDIA PLAYER

OTHER RELEVANT CASE STUDIES:

ENVIRONMENTAL INDUSTRIES

VISTA FOOD EXCHANGE

SHOW ALL CASE STUDIES

SPOTLIGHT FEATURE

OUR VALUE PROPOSITION

WE ARE ONE OF ONLY A FEW AAA-RATED  
LENDERS IN THE UNITED STATES WHICH  
GIVES US THE STABILITY TO VIEW EVERY  
NEW CUSTOMER AS THE START OF A  
LONG-TERM RELATIONSHIP

FIND OUT HOW OUR PURELY J TO O  
APPROACH MAKES US SIGNIFICANTLY  
DIFFERENT THAN A BANK

DOCUMENT CENTRAL

ADVANTAGE OF REVOLVERS	9/15/00
REVOLVER APPLICATION	9/8/00
CF ASSET BASED LENDING GUIDE	9/2/00
SIX SIGMA	9/31/00

SHOW ALL DOCUMENTS IN FILING CABINET

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HOME SOLUTIONS | PERSONAL FINANCES | CORPORATE INFO



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GE CAPITAL COMMERCIAL FINANCE		LOGOFF   PREFERENCES   HELP   SEARCH	CF DIRECTORY LIST
HOME	CUSTOMER CO.	49 SESSIONS	
SETUP GATEWAY	BRIAN	7 SESSIONS	
CUSTOMER ACTIVITY		GATEWAY SETUP ON NOV 27.2000	
RESOURCES		FIRST LOGIN DATE Nov 27.2000	
COMPANY STATUS			
CONTENT CENTRAL			
FEATURE		30 DAYS	31-60 DAYS
THE FOOD EXCHANGE	CASE STUDIES	0	0
COUNTRY GOLF	CASE STUDIES	2	0
ACCESS GE	GET TOOLS&TOURS	2	0
SUPPLY CHAIN MANAGEMENT	CASE STUDIES	1	0
JOE'S SEAFOOD	CASE STUDIES	1	0
LETTER TO SHARE OWNERS	SPOTLIGHT FEATURE	1	0
RESOURCE-5	RESOURCES	1	0
GE LINK DEMO	GET TOOLS&TOURS	1	0
WORKFLOW DEMO	GET TOOLS&TOURS	1	0
TOTAL		13	0
		0	13

FIG. 55